



GEARS

General Enterprise And Resource Support

PO250

Last Revised: May 15, 2013

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PO250

PO250 Managing Request for Quotes (RFQs)

Course Overview

It is a business requirement for the Judiciary that goods and services are acquired in a competitive manner and that businesses are given an opportunity to earn the business of the Judiciary in a fair and impartial marketplace. The effective use of Requests for Quotes (RFQs) is an essential component of any business system and supports the objectives of the Judiciary. RFQs allow companies to acquire the goods and services that are needed by the organization and also allow meaningful records to be retained for future reference in a competitive marketplace.

When any action is taken regarding RFQ activity, the system records pertinent data about the activity. The system retains the specifics of the activity including the system sign-on of the person doing the activity along with the date and time of the action.

Course Outline

The following lessons will help you understand the concepts associated with RFQs and to manage RFQs for the Judiciary.

- Course Audiences and Prerequisites
- Lesson 1: Entering and Updating RFQs
- Lesson 2: Inquiring on RFQ Information
- Course Summary

Course Audience and Prerequisite

Audience

The Judiciary audiences for this course are:

- AOC Procurement and Contract Admin

GEARS Role

This course is intended for Judiciary employees with the following GEARS role(s):

- CS Buyer Transactions

Prerequisites

The recommended prerequisites for this course are:

- INT100
- PO100

Lesson 1: Entering and Updating RFQs

Lesson Overview

This lesson covers the steps that are necessary to create an RFQ.

Lesson Objectives

After completing this lesson, you will be able to:

- Create a Vendor Quote Group
- Create a basic RFQ
- Enter Responses to an RFQ
- Create an RFQ from a Req

1.1 Entering a Vendor Quote Group

After a request for a quote is entered in the Purchasing module, you must define the vendors who are going to receive the RFQ. The vendors defined on the RFQ vendor quote group are those who will receive the entire RFQ including all the items or item groups. The online RFQ process is for the non-sealed bids under the \$25,000 threshold. Any procurements greater than \$25,000 will need to be conducted via the sealed bid process.

Vendor Quote Groups can be entered once and may then be used repeatedly over a long period of time. Generally, RFQ's are generated via the requisition process. When an RFQ is created, a new Vendor Quote Group does not have to be created. An existing Vendor Quote Group can be used.

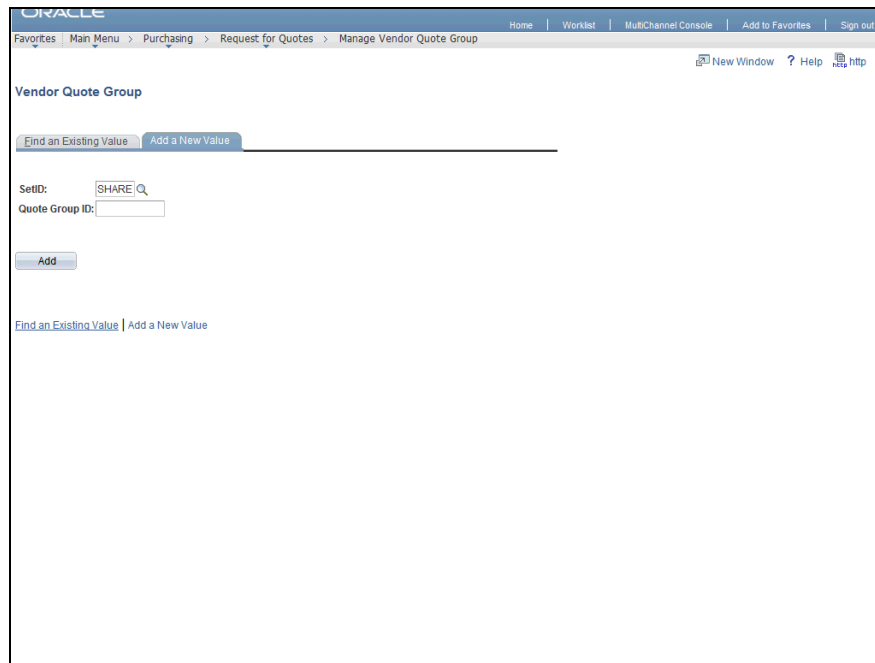
After completing this topic you will be able to:

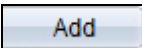
- Add a new vendor quote group
- Define the vendors included in a quote group

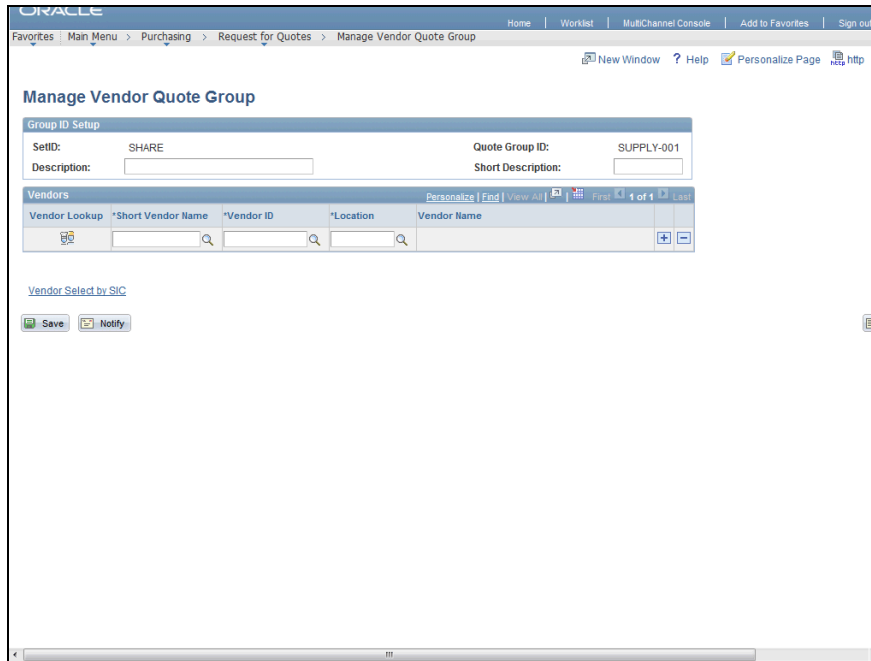
Procedure


In this topic, you will learn how to enter a vendor quote group list.

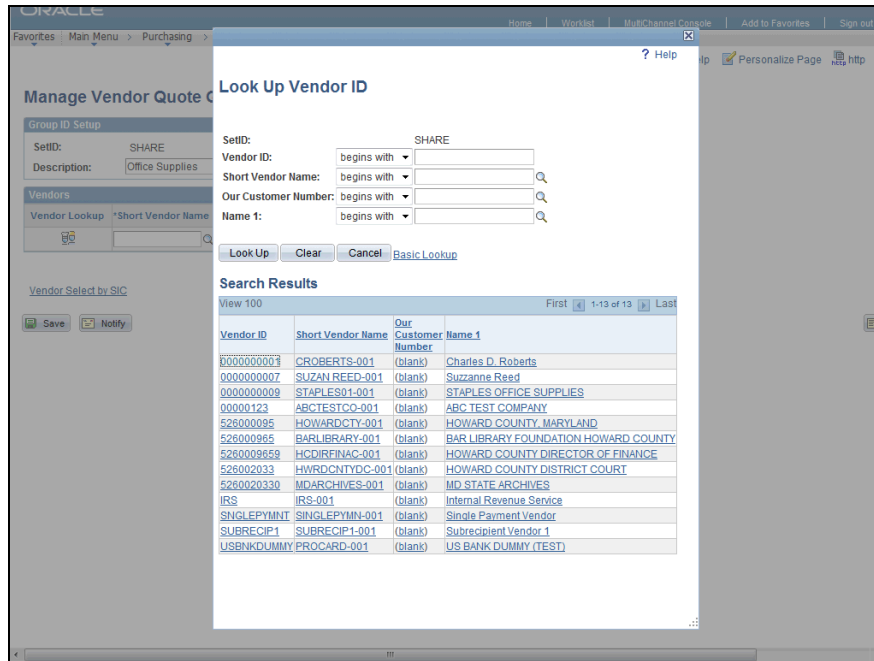
Step	Action
1.	Begin by navigating to the Vendor Quote Group page. Click the Purchasing menu link. Purchasing
2.	Click the Request for Quotes link. Request for Quotes
3.	Click the Manage Vendor Quote Group link. Manage Vendor Quote Group





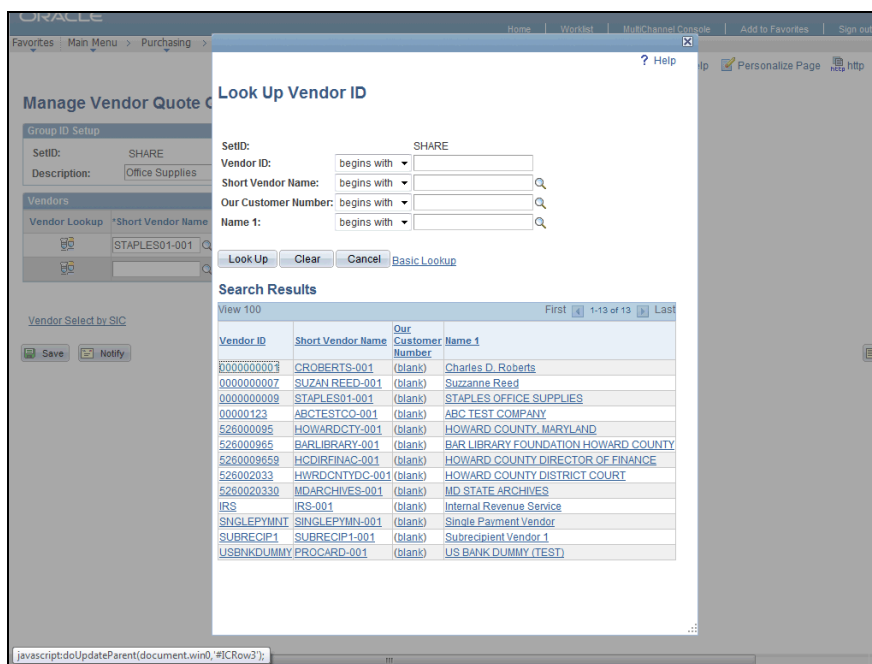
Step	Action
4.	The Vendor Quote Group - Add a New Value page displays. Use the Add a New Value page to define a Quote Group ID.
5.	Verify that the SetID field displays "SHARE".
6.	Enter the desired information into the Quote Group ID field.
7.	Click the Add button. 



Step	Action
8.	The Manage Vendor Quote Group page displays. You will use this page to define the vendors to whom you want to send the RFQ.
9.	Enter a description for the Vendor Quote Group into the Description field.
10.	The Short Description field will default. Optionally, override with a new short description.
11.	Select vendors to include in the vendor quote group in the Vendors section. Click the Look up Short Vendor Name button. 



Step	Action
12.	<p>The Look Up Vendor ID page displays.</p> <p>If the vendor you want to select is not listed in the search results grid, enter search criteria to narrow your search results or select a value listed.</p>
13.	<p>The Manage Vendor Quote Group page displays.</p> <p>You can add more vendors by clicking the Add New Row ("plus") button at the end of a row.</p> <p>NOTE: Delete a row by clicking the Delete a Row ("minus") button at the end of a row.</p>
14.	<p>Add another vendor by clicking the Add a new row button.</p> <p></p>
15.	<p>On the new row, click the Look up Vendor ID button.</p> <p></p>



Look Up Vendor ID

SetID: SHARE

Vendor ID: begins with

Short Vendor Name: begins with

Our Customer Number: begins with

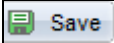
Name 1: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-13 of 13 Last

Vendor ID	Short Vendor Name	Our Customer Number	Name 1
0000000001	CROBERTS-001	(blank)	Charles D. Roberts
0000000007	SUZAN REED-001	(blank)	Suzanne Reed
0000000009	STAPLES01-001	(blank)	STAPLES OFFICE SUPPLIES
00000123	ABCTESTCO-001	(blank)	ABC TEST COMPANY
526000095	HOWARDCTY-001	(blank)	HOWARD COUNTY, MARYLAND
526000965	BARLIBRARY-001	(blank)	BAR LIBRARY FOUNDATION HOWARD COUNTY
5260009659	HCDIRFINAC-001	(blank)	HOWARD COUNTY DIRECTOR OF FINANCE
526002033	HWRDCNTYDC-001	(blank)	HOWARD COUNTY DISTRICT COURT
5260020330	MDARCHIVES-001	(blank)	MD STATE ARCHIVES
IRS	IRS-001	(blank)	Internal Revenue Service
SINGLEPYMNT	SINGLEPYMNT-001	(blank)	Single Payment Vendor
SUBRECIP1	SUBRECIP1-001	(blank)	Subrecipient Vendor 1
USBNKDDUMMYPROCARD-001		(blank)	US BANK DUMMY (TEST)

Step	Action
16.	<p>The Look up Vendor ID page displays.</p> <p>Click the vendor link for the vendor you want to include in the vendor group.</p> <p><u>ABCTESTCO-001</u></p>
17.	<p>The vendors you have added to the quote group display in the Vendors section.</p> <p>Click the Save button.</p> <p></p>
18.	<p>You have successfully completed the <i>Entering a Vendor Quote Group</i> topic.</p> <p>You have learned to:</p> <ul style="list-style-type: none"> - Add a new vendor quote group - Define the vendors included in a quote group <p>End of Procedure.</p>

1.2 Entering an RFQ and Dispatching to Vendors

After a Vendor Quote Group has been entered in the Purchasing module, you must enter the RFQ and dispatch to the vendors in the Vendor Quote Group.




As indicated earlier in this course, a Vendor Quote Group can be used on more than one RFQ. Vendor Quote Groups can be used repeatedly and they can be modified over time. A new Vendor Quote Group is not required to be used for each RFQ.

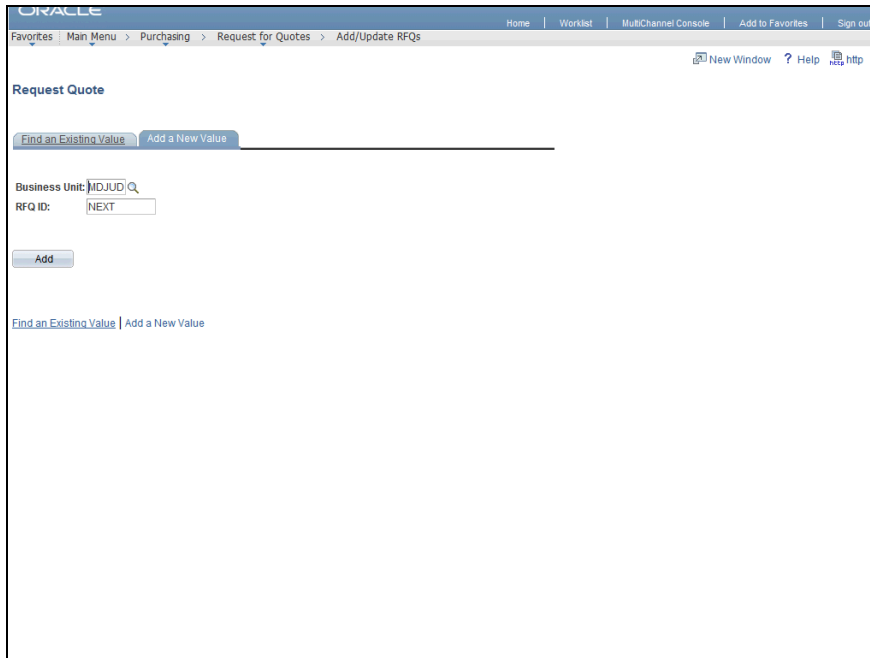
After completing this topic, you will be able to:

- Enter an RFQ
- Dispatch the RFQ to the vendors in the vendor quote group

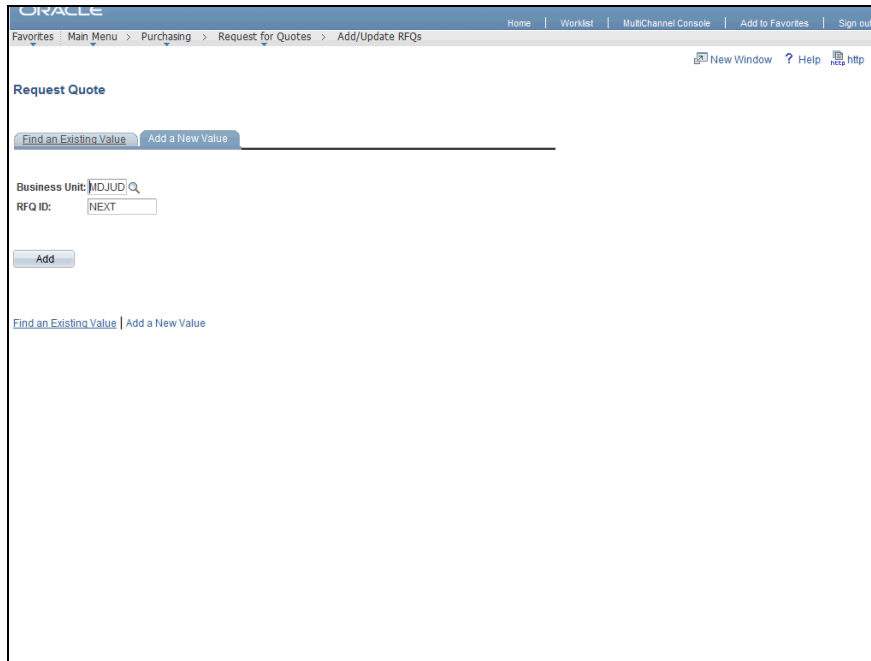
Procedure

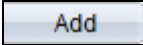
In this topic, you will learn to enter and dispatch an RFQ to vendors in a vendor quote group.

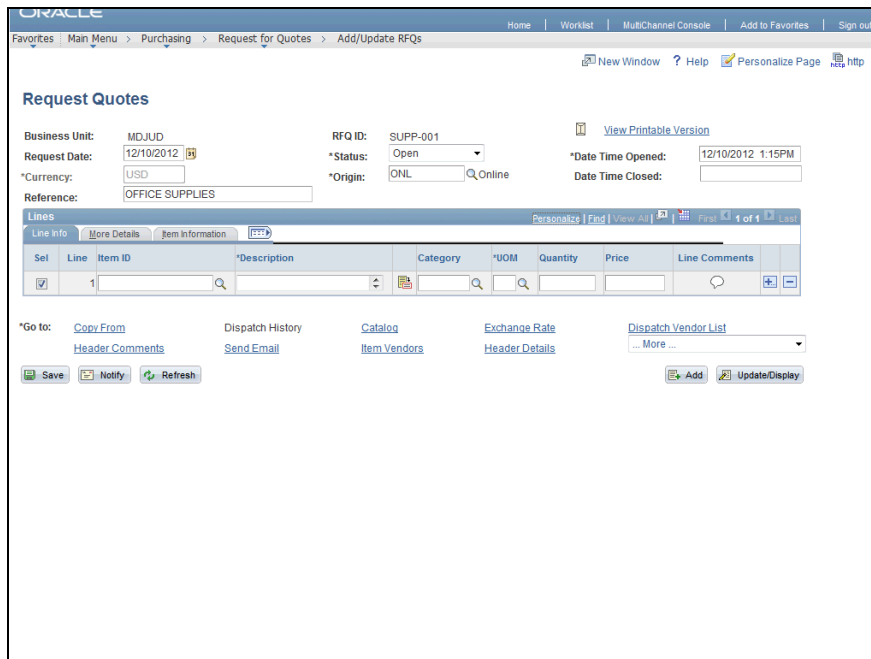
Step	Action
1.	Begin by navigating to the Request Quotes page. Click the Purchasing link. 
2.	Click the Request for Quotes link. 
3.	Click the Add/Update RFQs link. 



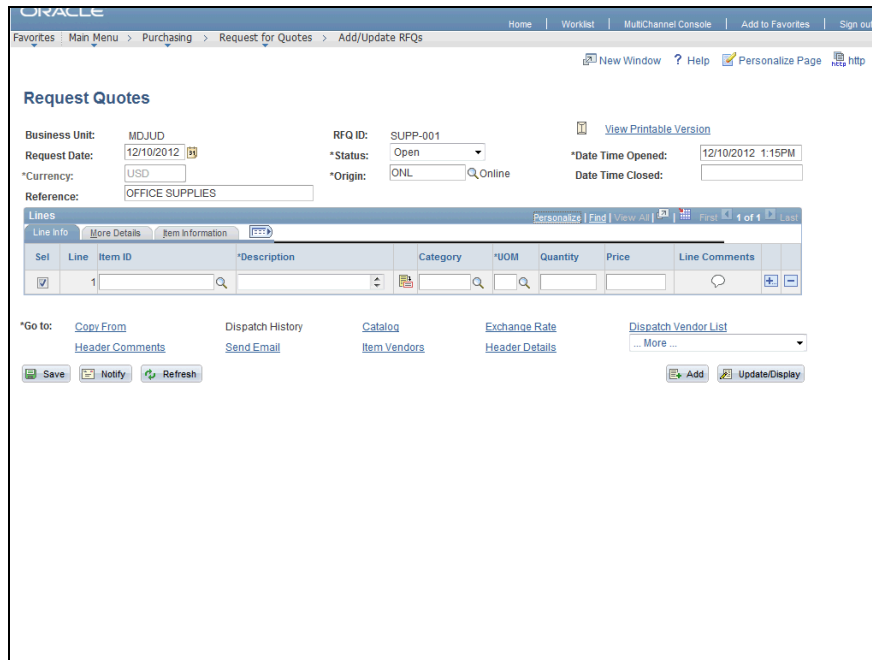
Step	Action
4.	The Add a New Value page displays. Use this page to create an RFQ ID.



Step	Action
5.	Enter the desired RFQ ID into the RFQ ID field.
6.	Click the Add button. 



Step	Action
7.	<p>The Request Quotes page displays.</p> <p>You will use this page to create the request for quotes from the Vendor Quote Group you created in the previous topic.</p>




The screenshot shows the Oracle Request Quotes page. At the top, there's a navigation bar with links like Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below this is a breadcrumb trail: Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update RFQs. The main heading is "Request Quotes".

Form fields include:

- Business Unit: MDJUD
- Request Date: 12/10/2012
- *Currency: USD
- Reference: OFFICE SUPPLIES
- RFQ ID: SUPP-001
- *Status: Open
- *Origin: ONL
- *Date Time Opened: 12/10/2012 1:15PM
- Date Time Closed:

There's a "View Printable Version" link. Below the form fields is a table with columns: Sel, Line, Item ID, *Description, Category, *UOM, Quantity, Price, Line Comments. The first row shows Line 1 with Item ID and Description fields.

At the bottom, there are buttons: Save, Notify, Refresh, Add, and Update/Display. There are also links for "Go to: Copy From, Dispatch History, Catalog, Exchange Rate, Dispatch Vendor List, Header Comments, Send Email, Item Vendors, Header Details".

Step	Action
8.	Enter the desired information into the Reference field.
9.	<p>Click the Look up Item ID button.</p> 

Request Quotes

Business Unit: MDJUD
Request Date: 12/10/2012
*Currency: USD
Reference: OFFICE SUPPLIES

Look Up Item ID

SetID: SHARE
Item ID: begins with DC
Category: begins with
Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Item ID	Category	Category ID	Description
DC-1	MISCELLANEOUS	00007	Stamps, Rubber
DC-2	EQUIPMENT	00008	Fax, Sharp FO2081 20ppm
DC-3	OFFICE FURNITURE	00004	File Cabinets, Lateral, Metal
DC-4	OFF. SUPPLIES	00015	Labels, File Stickers and Labels
DCICR001BR6	FORM	00001	Criminal Information Brochure
DCICR001BR3	FORM	00001	Criminal Information Brochure
DCICR002BR6	FORM	00001	Criminal Information Brochure
DCICR002BR3	FORM	00001	Criminal Information Brochure
DCICR010	FORM	00001	Affidavit of Bail Bondsman
DCICR011	FORM	00001	Personal Reconnaissance Notice
DCICR013	FORM	00001	Release from Commitment
DCICR015	FORM	00001	Recall of Order of Arrest/Crim
DCICR016	FORM	00001	Order of Court in Bail Review
DCICR017	FORM	00001	Notice of Appeal
DCICR017A	FORM	00001	Order Pending Appeal
DCICR021	FORM	00001	Order for Deferred Payment/Ack
DCICR022	FORM	00001	Order of Court
DCICR023	FORM	00001	Bench Warrant/Return of Servic
DCICR030	FORM	00001	Charge Against Fugitive
DCICR030A	FORM	00001	Arrest Warrant for Fugitive Re
DCICR031	FORM	00001	Consent to Waive/Order of Wai
DCICR033	FORM	00001	Petition for Determination of
DCICR037	FORM	00001	Petition to Strike Bond Forfe

Step	Action
10.	<p>The Look Up Item ID page displays with the queried results.</p> <p>Use these results to select the Item ID from the search.</p>

Request Quotes

Business Unit: MDJUD
Request Date: 12/10/2012
*Currency: USD
Reference: OFFICE SUPPLIES



Look Up Item ID

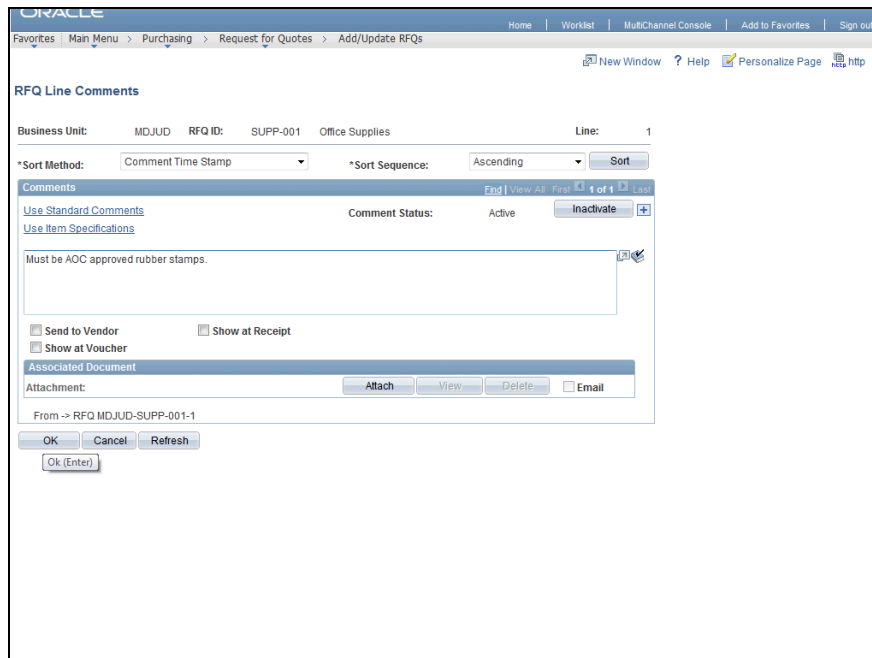
SetID: SHARE
Item ID: begins with DC
Category: begins with
Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Item ID	Category	Category ID	Description
DC-1	MISCELLANEOUS	00007	Stamps, Rubber
DC-2	EQUIPMENT	00008	Fax, Sharp FO2081 20ppm
DC-3	OFFICE FURNITURE	00004	File Cabinets, Lateral, Metal
DC-4	OFF. SUPPLIES	00015	Labels, File Stickers and Labels
DCICR001BR6	FORM	00001	Criminal Information Brochure
DCICR001BR3	FORM	00001	Criminal Information Brochure
DCICR002BR6	FORM	00001	Criminal Information Brochure
DCICR002BR3	FORM	00001	Criminal Information Brochure
DCICR010	FORM	00001	Affidavit of Bail Bondsman
DCICR011	FORM	00001	Personal Reconnaissance Notice
DCICR013	FORM	00001	Release from Commitment
DCICR015	FORM	00001	Recall of Order of Arrest/Crim
DCICR016	FORM	00001	Order of Court in Bail Review
DCICR017	FORM	00001	Notice of Appeal
DCICR017A	FORM	00001	Order Pending Appeal
DCICR021	FORM	00001	Order for Deferred Payment/Ack
DCICR022	FORM	00001	Order of Court
DCICR023	FORM	00001	Bench Warrant/Return of Servic
DCICR030	FORM	00001	Charge Against Fugitive
DCICR030A	FORM	00001	Arrest Warrant for Fugitive Re
DCICR031	FORM	00001	Consent to Waive/Order of Wai
DCICR033	FORM	00001	Petition for Determination of
DCICR037	FORM	00001	Petition to Strike Bond Forfe

Step	Action
11.	Click the Item ID link you want to include in your items list. 
12.	The Request Quotes page displays. You can add more items by clicking the Add New Row ("plus") button at the end of the row. NOTE: Delete a row by clicking the Delete a Row ("minus") button at the end of the row.
13.	Enter the desired information into the Quantity field.
14.	Click the Line Comments button. 



Step	Action
15.	The RFQ Line Comments page displays. Use this page to enter specific comments about the RFQ line item in the Comments field. In this example, comments have been entered for you.

ORACLE
Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update RFQs

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window ? Help Personalize Page http

RFQ Line Comments

Business Unit: MDJUD RFQ ID: SUPP-001 Office Supplies Line: 1

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments Find | View All Find 4 of 1 Last

[Use Standard Comments](#) [Use Item Specifications](#) Comment Status: Active Inactivate +

Must be AOC approved rubber stamps.

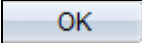
☐ Send to Vendor ☐ Show at Receipt
☐ Show at Voucher

Associated Document

Attachment: Attach View Delete Email

From -> RFQ MDJUD-SUPP-001-1

OK Cancel Refresh

Step	Action
16.	Click the OK button when you are finished. 

ORACLE
Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update RFQs

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window Personalize Page http

Request Quotes

Business Unit: MDJUD RFQ ID: SUPP-XXX View Printable Version

Request Date: 01/04/2013 *Status: Open *Date Time Opened: 01/04/2013 10:45AM

*Currency: USD *Origin: ONL Online Date Time Closed:

Reference:

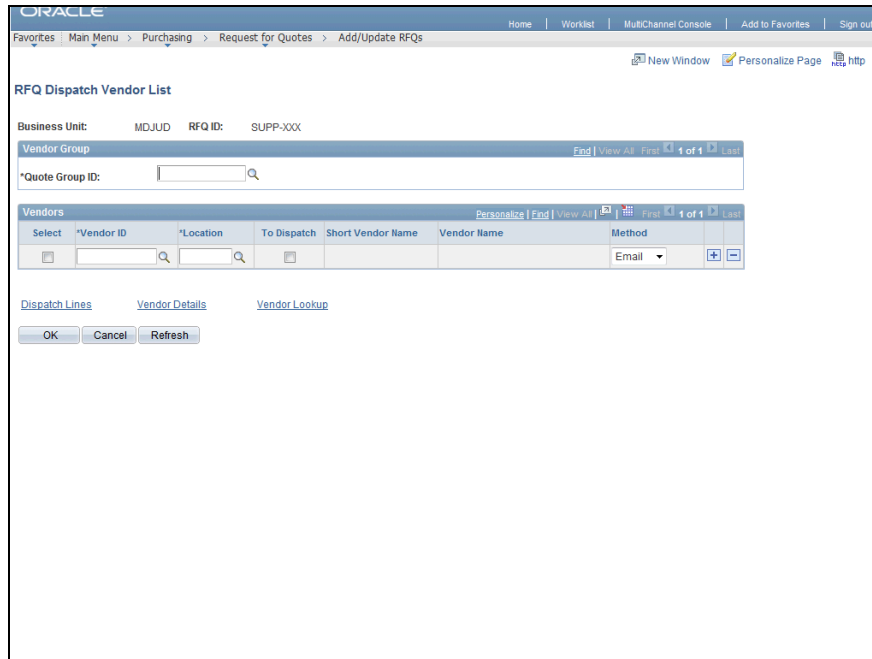
Lines Personalize | Find | View All Find 4 of 1 Last

Sel	Line	Item ID	*Description	Category	*UOM	Quantity	Price	Line Comments
<input checked="" type="checkbox"/>	1	DC-1	Stamps, Rubber	MISCELLANEOUS	EA	10.0000	75.00000	

*Go to: [Copy From](#) [Dispatch History](#) [Catalog](#) [Exchange Rate](#) [Dispatch Vendor List](#)
[Header Comments](#) [Send Email](#) [Item Vendors](#) [Header Details](#) ... More ...

Save Notify Refresh Add Update/Display

Step	Action
17.	<p>The Request Quotes page displays.</p> <p>Click the Dispatch Vendor List link.</p> <p>Dispatch Vendor List</p>



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update RFQs

New Window | Personalize Page | http

RFQ Dispatch Vendor List

Business Unit: MDJUD RFQ ID: SUPP-XXX

Vendor Group: [Search] End | View All | First 1 of 1 Last


*Quote Group ID: [Search]

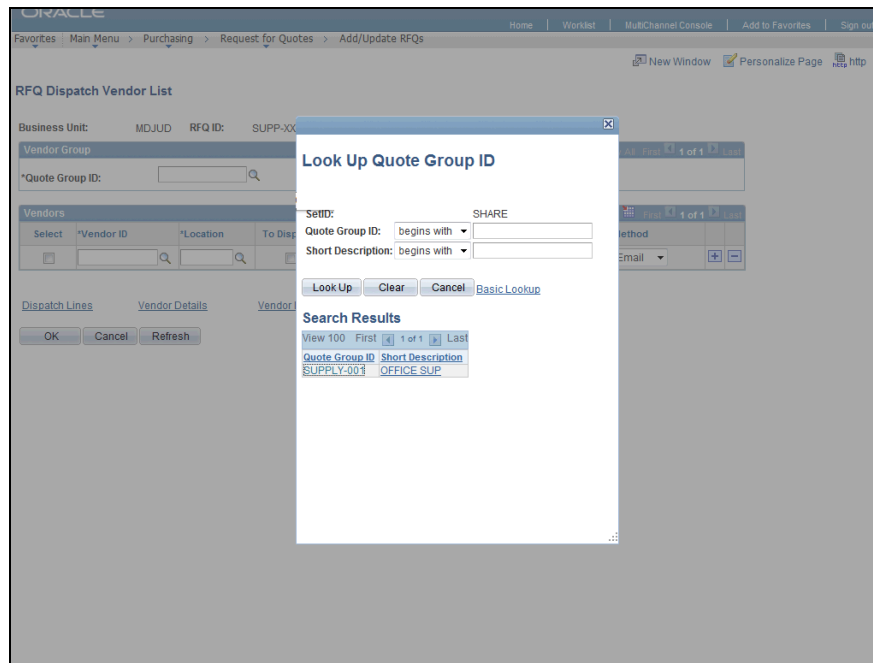
Vendors: Personalize | End | View All | First 1 of 1 Last

Select	*Vendor ID	*Location	To Dispatch	Short Vendor Name	Vendor Name	Method
<input type="checkbox"/>	[Search]	[Search]	<input type="checkbox"/>			Email [Dropdown] [Buttons]

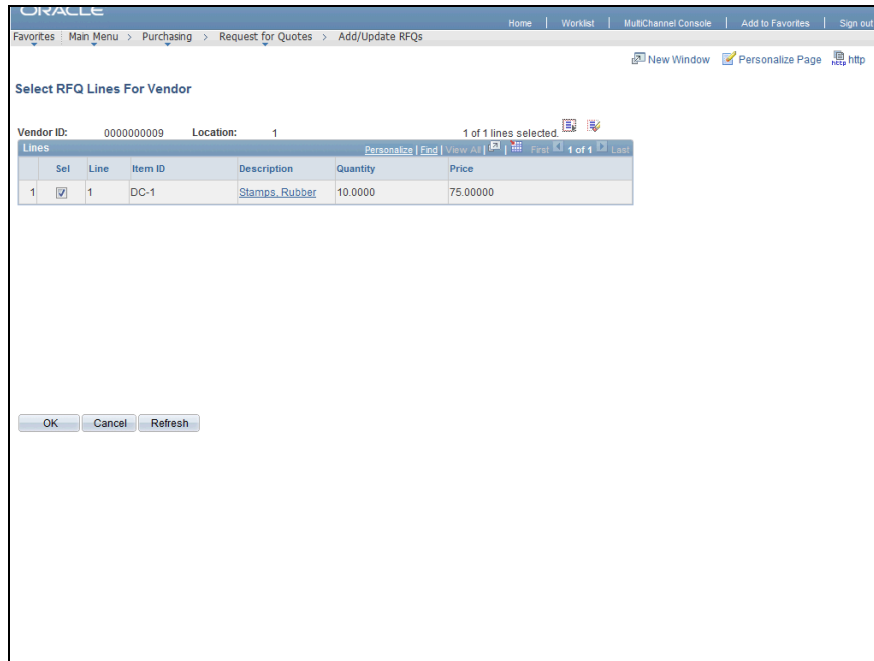
Dispatch Lines | Vendor Details | Vendor Lookup

OK | Cancel | Refresh

Step	Action
18.	<p>The RFQ Dispatch Vendor List page displays.</p> <p>Use this page to assign a vendor quote group to receive quotes for the RFQ line items.</p>
19.	<p>Click the Look up Quote Group ID button.</p> <p></p>



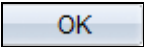
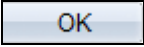
Step	Action
20.	The Look Up Quote Group ID page displays. Use this page to search for the Vendor Quote Group from whom you want to receive quotes.
21.	Select a Quote Group from the list. <u>SUPPLY-001</u>
22.	The RFQ Dispatch Vendor List page displays. The Quote Group ID field displays your selection.
23.	In the Vendors , section, click the check box for the vendor to which you want to send the RFQ. <input type="checkbox"/>
24.	Click the To Dispatch checkbox. <input type="checkbox"/>
25.	Click the Dispatch Lines link. <u>Dispatch Lines</u>

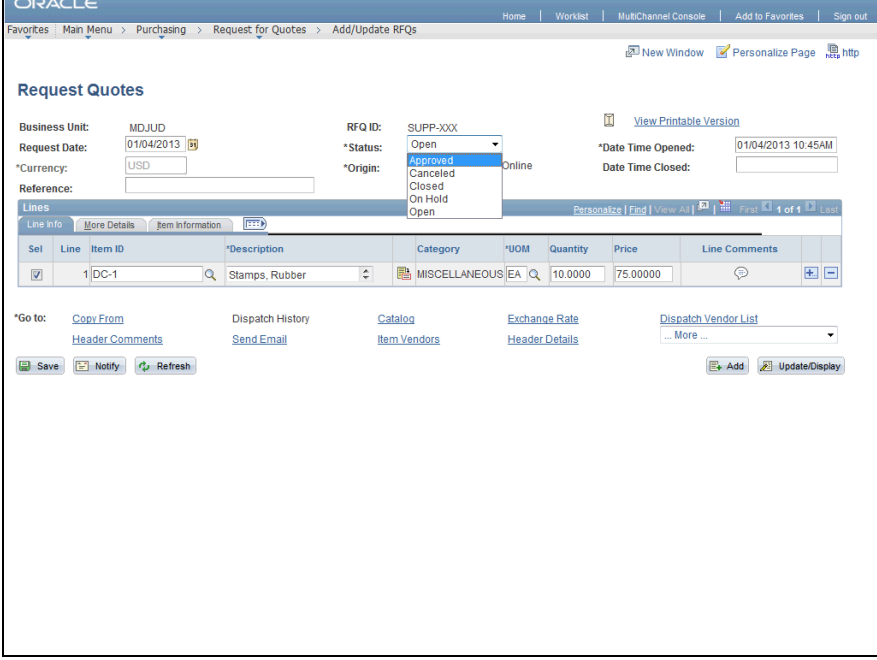



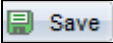


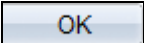
Select RFQ Lines For Vendor
 Vendor ID: 000000009 Location: 1 1 of 1 lines selected
 Lines

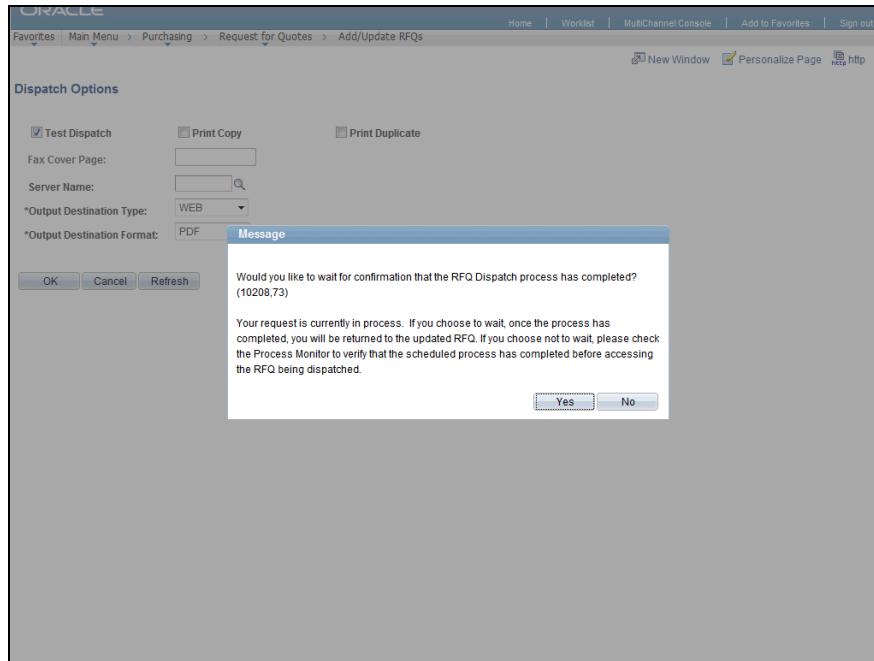
Sel	Line	Item ID	Description	Quantity	Price
<input checked="" type="checkbox"/>	1	DC-1	Stamps Rubber	10.0000	75.00000

 OK Cancel Refresh

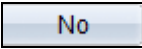
Step	Action
26.	<p>The Select RQF Lines For Vendor page displays.</p> <p>View and select the appropriate RFQ Lines desired for this vendor.</p> <p>Click the OK button.</p> 
27.	<p>The RFQ Dispatch Vendor List page displays.</p> <p>Click the OK button.</p> 

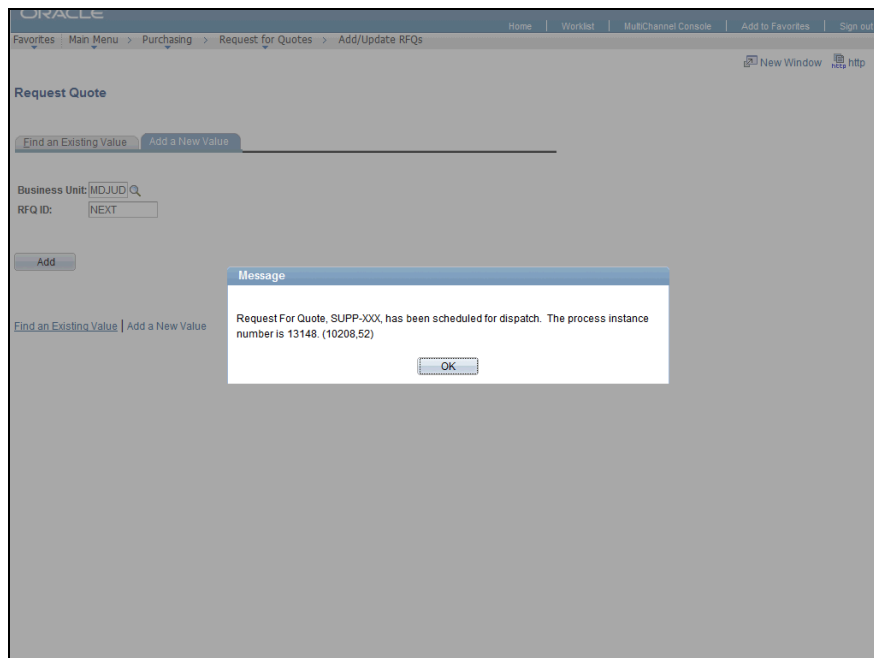


Step	Action
28.	<p>The Request Quotes page displays.</p> <p>Click the Status field and select the Approved list item.</p> 
29.	<p>Click the Save button.</p> 
30.	<p>Click the Dispatch button.</p> 
31.	<p>The Dispatch Options page displays. Use this page to choose the method to dispatch to the vendors.</p> <p>Click the Test Dispatch option.</p> 
32.	<p>Click the OK button.</p> 




The screenshot shows the 'Dispatch Options' window in the Oracle application. The window has a title bar with 'ORACLE' and a menu bar with 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below the menu bar is a breadcrumb trail: 'Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update RFQs'. The main content area is titled 'Dispatch Options' and contains several options: 'Test Dispatch' (checked), 'Print Copy', and 'Print Duplicate'. There are input fields for 'Fax Cover Page', 'Server Name', and 'Output Destination Type' (set to 'WEB'). The 'Output Destination Format' is set to 'PDF'. At the bottom are 'OK', 'Cancel', and 'Refresh' buttons. A modal message box is overlaid on the window, asking: 'Would you like to wait for confirmation that the RFQ Dispatch process has completed? (10208,73)'. The message box contains the text: 'Your request is currently in process. If you choose to wait, once the process has completed, you will be returned to the updated RFQ. If you choose not to wait, please check the Process Monitor to verify that the scheduled process has completed before accessing the RFQ being dispatched.' At the bottom of the message box are 'Yes' and 'No' buttons.

Step	Action
33.	<p>A message displays.</p> <p>If you want to wait for the dispatch process to finish, click the Yes button. If not, click the No button.</p> 



The screenshot shows the 'Request Quote' window in the Oracle application. The window has a title bar with 'ORACLE' and a menu bar with 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below the menu bar is a breadcrumb trail: 'Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update RFQs'. The main content area is titled 'Request Quote' and contains a search bar with 'Find an Existing Value' and 'Add a New Value' buttons. Below the search bar are input fields for 'Business Unit' (set to 'MDJUD Q') and 'RFQ ID' (set to 'NEXT'). There is an 'Add' button. At the bottom are 'Find an Existing Value' and 'Add a New Value' buttons. A modal message box is overlaid on the window, asking: 'Request For Quote, SUPP-XXX, has been scheduled for dispatch. The process instance number is 13148. (10208,52)'. The message box contains the text: 'Request For Quote, SUPP-XXX, has been scheduled for dispatch. The process instance number is 13148. (10208,52)'. At the bottom of the message box is an 'OK' button.

Step	Action
34.	<p>When you select No, the a message displays to confirm that the process has been scheduled.</p> <p>Click the OK button.</p> 
35.	<p>You have successfully completed the <i>Entering an RFQ and Dispatching to Vendors</i> topic.</p> <p>You have learned to:</p> <ul style="list-style-type: none"> - Enter an RFQ - Dispatch the RFQ to the vendors in the vendor quote group <p>End of Procedure.</p>

1.3 Entering RFQ from a Requisition

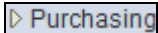


In the last topic, you learned one way to enter a RFQ. However, you can also enter an RFQ from a requisition.

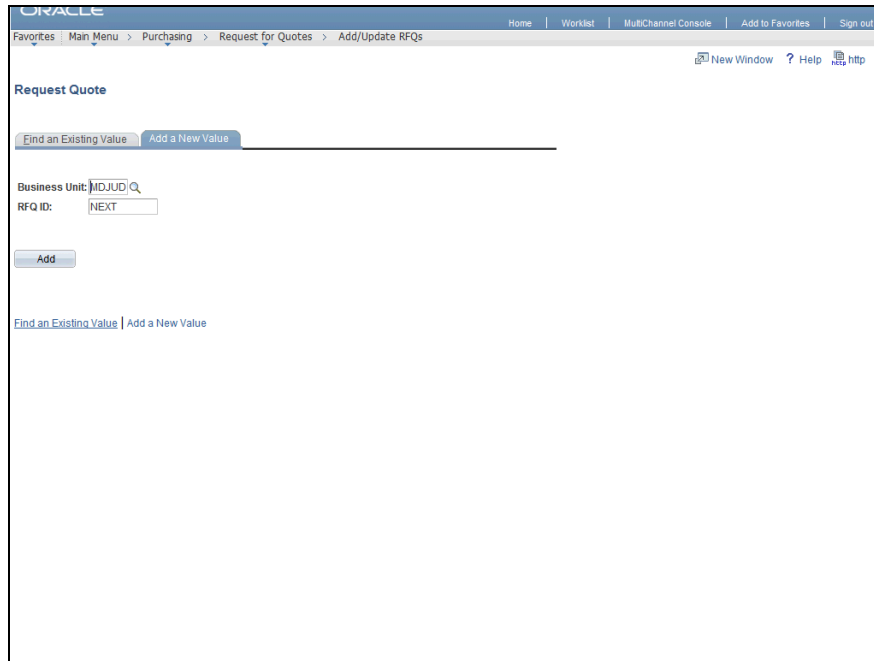
After completing this topic, you will be able to:

- Enter an RFQ from a previously created requisition

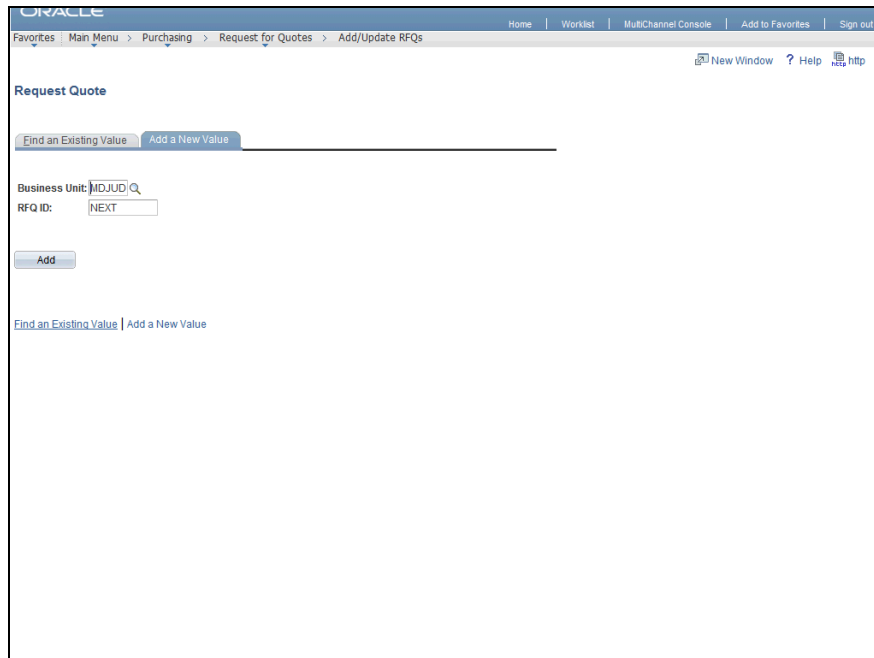
Procedure

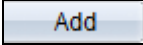
In this topic, you will enter an RFQ from a requisition.

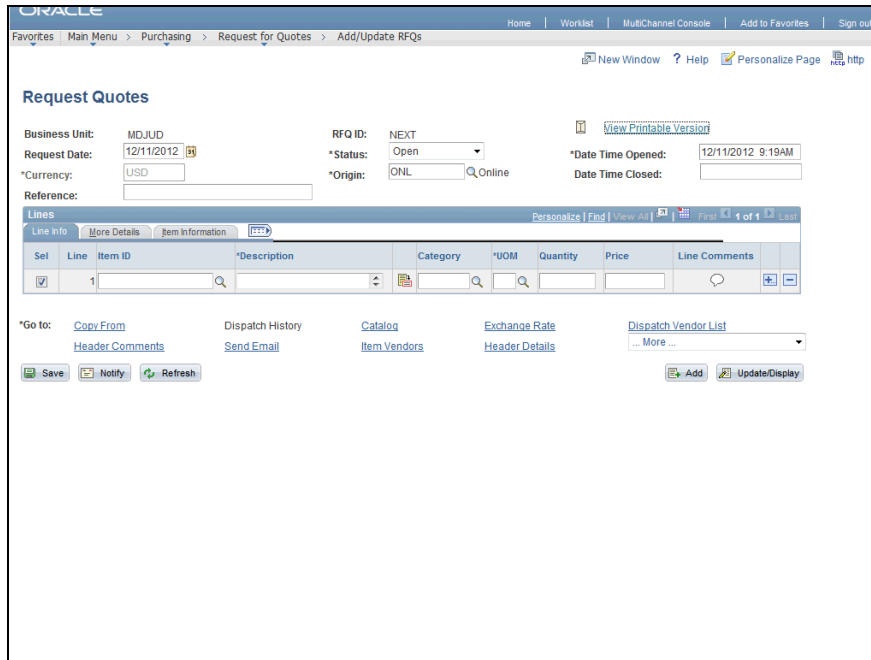
Step	Action
1.	<p>Begin by navigating to the Request Quotes page.</p> <p>Click the Purchasing link.</p> 
2.	<p>Click the Request for Quotes link.</p> 
3.	<p>Click the Add/Update RFQs link.</p> 



Step	Action
4.	<p>The Add a New Value page displays.</p> <p>Use this page to automatically or manually create an RFQ ID.</p>



Step	Action
5.	<p>For this example, allow the RFQ to be auto-numbered (RFQ_ID = "NEXT").</p> <p>Click the Add button.</p> 



The screenshot shows the Oracle Request Quotes page. The top navigation bar includes links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. The main header shows the breadcrumb: Favorites > Main Menu > Purchasing > Request for Quotes > Add/Update RFQs. The page title is "Request Quotes".

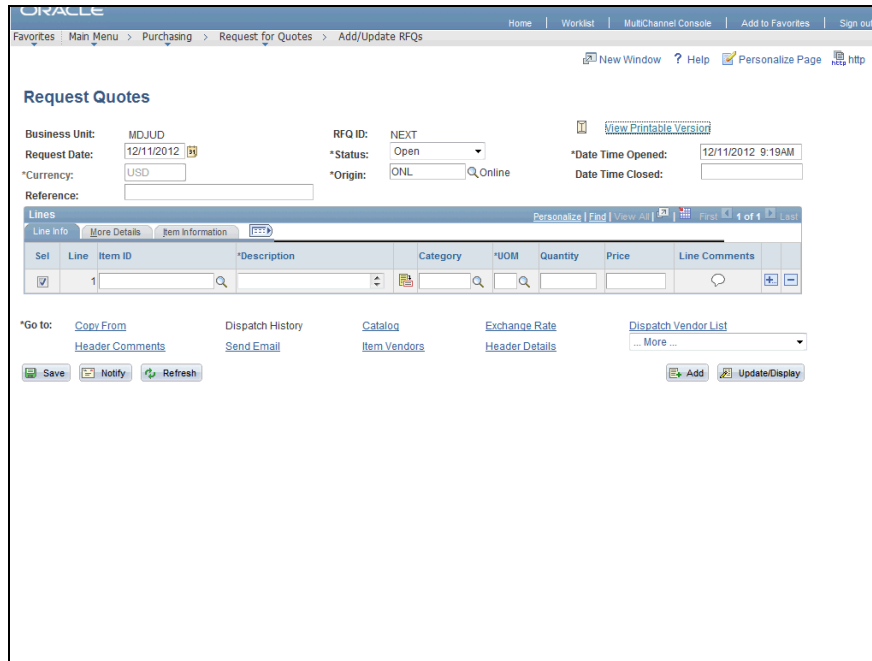
Form fields include:


- Business Unit: MDJUD
- Request Date: 12/11/2012
- *Currency: USD
- Reference:
- RFQ ID: NEXT
- *Status: Open
- *Origin: ONL
- *Date Time Opened: 12/11/2012 9:19AM
- Date Time Closed:

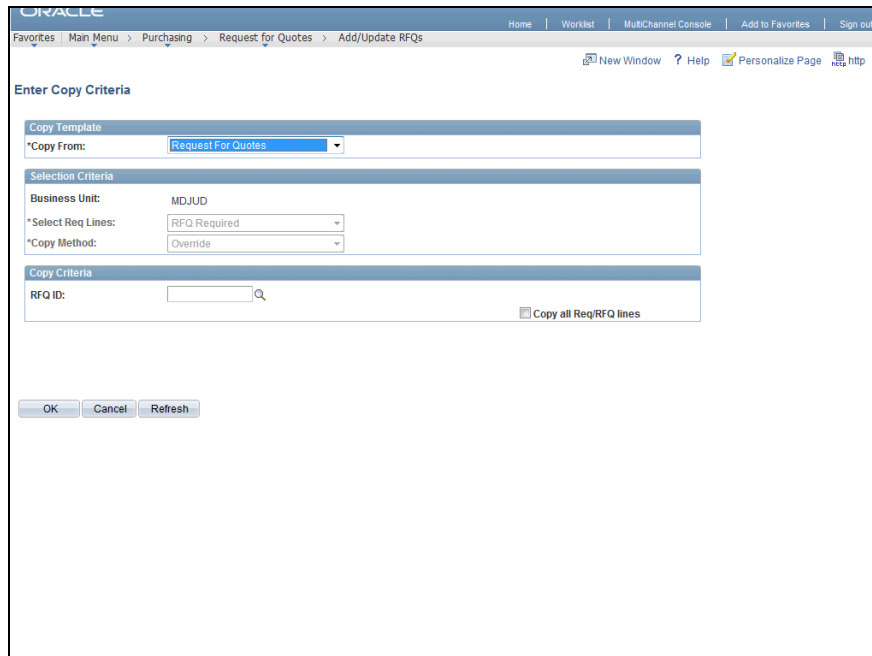
There is a "View Printable Version" link. Below the form fields is a "Lines" section with a table. The table has columns: Sel, Line, Item ID, *Description, Category, *UOM, Quantity, Price, Line Comments. The first row is selected (Sel: [x], Line: 1).

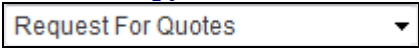
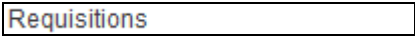

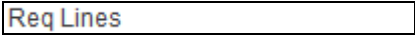


At the bottom, there are links for "Go to: Copy From", "Dispatch History", "Catalog", "Exchange Rate", and "Dispatch Vendor List". There are also buttons for "Save", "Notify", "Refresh", "Add", and "Update/Display".

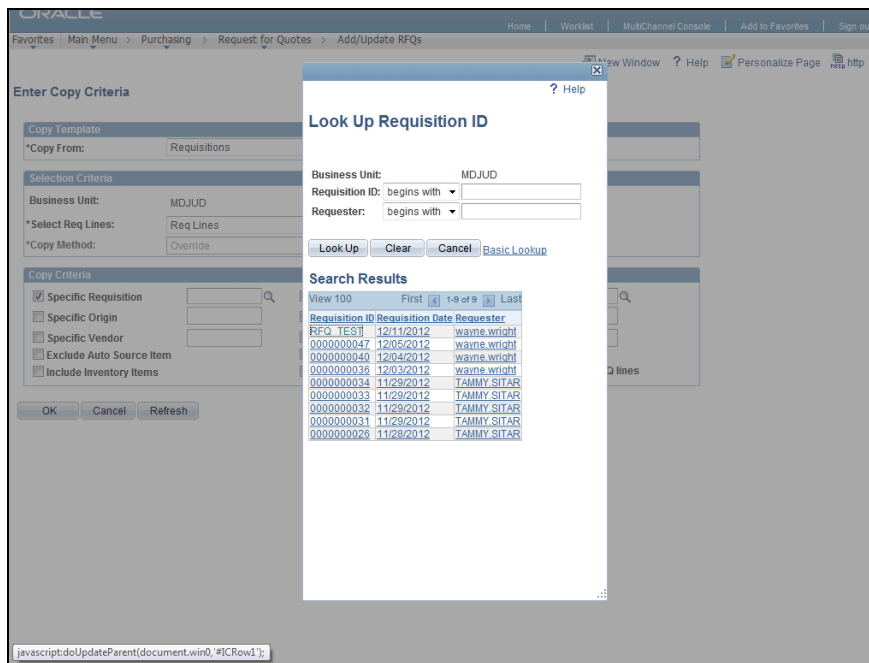
Step	Action
6.	<p>The Request Quotes page displays.</p> <p>You can use this page to define the request to receive quotes.</p>



Step	Action
7.	Enter the desired information into the Reference field.
8.	Click the Copy From link. 



Step	Action
9.	The Enter Copy Criteria page displays. Use this page to define the criteria of the requisition.
10.	Click the Copy From list. 
11.	Click the Requisitions list item. 
12.	Click the Select Req Lines list. 
13.	Click the Req Lines list item. 
14.	Click the Specific Requisition option. 
15.	Click the Look up Requisition ID button. 



Look Up Requisition ID

Business Unit: MDJUD
 Requisition ID: begins with
 Requester: begins with


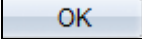
[Basic Lookup](#)

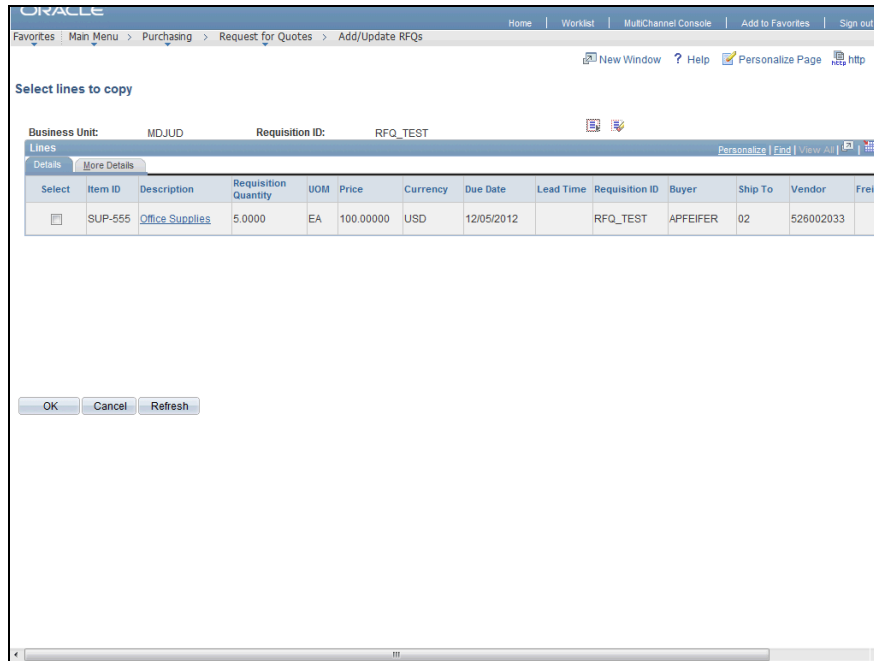
Search Results

View 100 First 1-9 of 9 Last

Requisition ID	Requisition Date	Requester
RFO_TEST	12/11/2012	wayne.wright
0000000047	12/05/2012	wayne.wright
0000000049	12/04/2012	wayne.wright
0000000038	12/03/2012	wayne.wright
0000000034	11/29/2012	TAMMY SITAR
0000000033	11/29/2012	TAMMY SITAR
0000000032	11/29/2012	TAMMY SITAR
0000000031	11/29/2012	TAMMY SITAR
0000000028	11/28/2012	TAMMY SITAR

Step	Action
16.	The Look Up Requisition ID page displays. Use this page to select the Requisition ID .

Step	Action
17.	Click the Requisition ID link. 
18.	Click the OK button. 


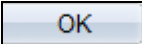


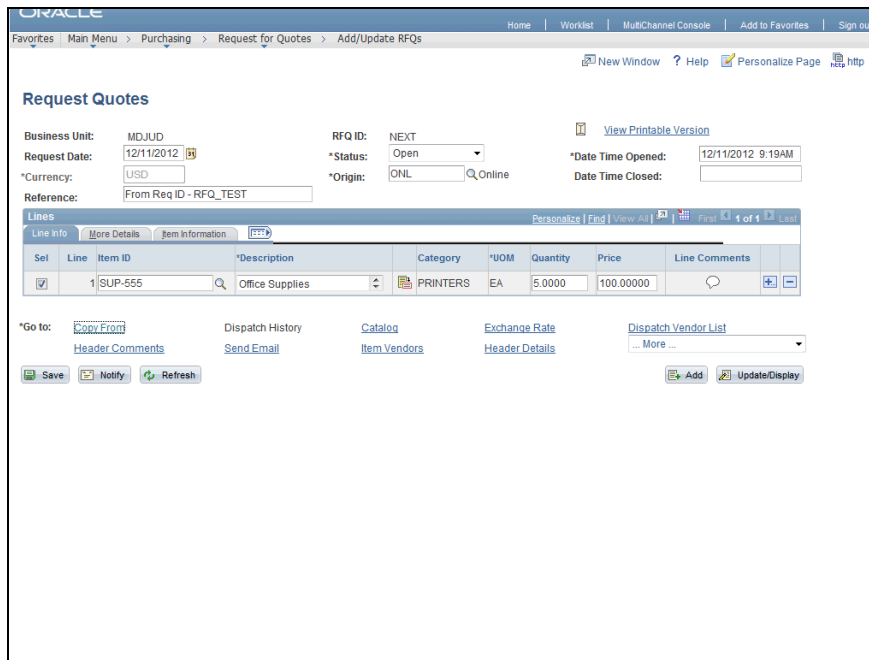
Business Unit: MDJUD Requisition ID: RFQ_TEST

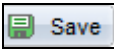
Lines

Select	Item ID	Description	Requisition Quantity	UOM	Price	Currency	Due Date	Lead Time	Requisition ID	Buyer	Ship To	Vendor	Freight
<input type="checkbox"/>	SUP-555	Office Supplies	5.0000	EA	100.00000	USD	12/05/2012		RFQ_TEST	APFEIFER	02	526002033	

OK Cancel Refresh

Step	Action
19.	<p>The Select lines to copy page displays.</p> <p>Use this page to select the lines you desire to copy and use in your RFQ.</p> <p>NOTE: If the requisition were to have multiple lines, this screen will allow you to narrow the selection to one or more lines to copy over to your new RFQ.</p> <p>Click the Select option.</p> 
20.	<p>Click the OK button.</p> 



Step	Action
21.	The Request Quotes page displays with the chosen line(s) from the selected requisition.
22.	Click the Save button. 
23.	You have successfully completed the <i>Entering RFQ from a Requisition</i> topic. You have learned to: - Enter an RFQ from a previously created requisition End of Procedure.

1.4 Entering RFQ Responses




Once you have entered an RFQ and dispatched the RFQ to a Vendor Quote Group to request a quote, you must acknowledge and receive in the quotes. The quotes you receive are the responses to your request from the vendors and you must enter them into GEARS.

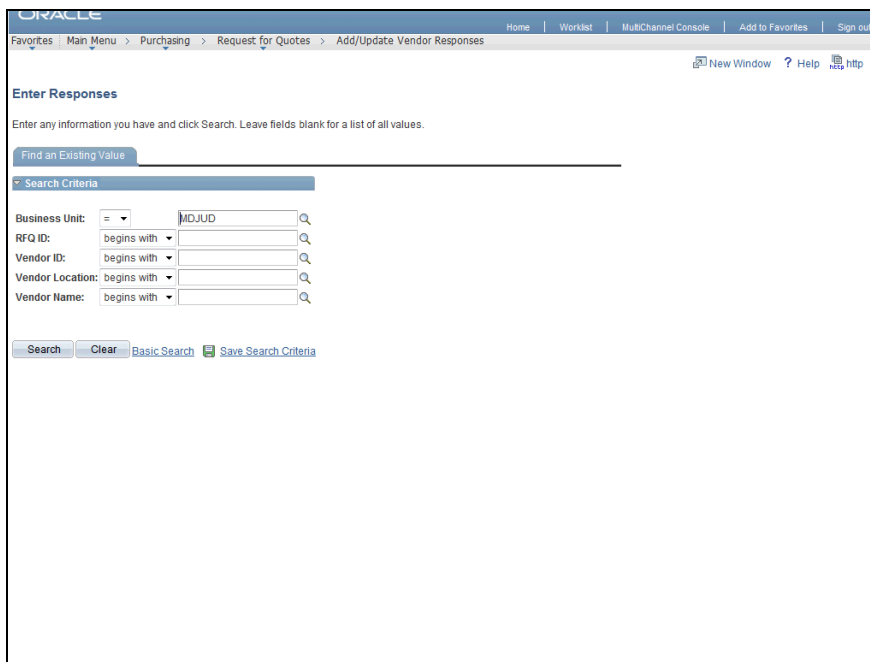
After completing this topic, you will be able to:

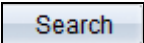
- Enter RFQ responses received from the vendors
- Review quotes from the vendors of the Vendor Quote Group

Procedure

In this topic, you will enter RFQ responses to an RFQ and review quotes.

Step	Action
1.	Begin by navigating to the Maintain Responses page. Click the Purchasing link. 
2.	Click the Request for Quotes link. 
3.	Click the Add/Update Vendor Responses link. 



Step	Action
4.	The Find an Existing Value page displays. Use this page to perform a search for the RFQ for which you will enter responses.
5.	For this example, perform a general search without entering any criteria. Click the Search button. 

ORACLE
Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update Vendor Responses

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window ? Help http

Enter Responses

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit:

RFQ ID:

Vendor ID:

Vendor Location:

Vendor Name:

Search Results

View All First 1-7 of 7 Last

Business Unit	RFQ ID	Vendor Name	Vendor ID	Vendor Location
MJUD	TST	STAPLES01-001	0000000009	1
MJUD	TST	ABCTESTCO-001	00000123	MAIN
MJUD	SUPP-001	STAPLES01-001	0000000009	1
MJUD	SUPP-001	ABCTESTCO-001	00000123	MAIN
MJUD	0000000002	STAPLES01-001	0000000009	1
MJUD	0000000002	ABCTESTCO-001	00000123	MAIN
MJUD	0000000001	ABCTESTCO-001	00000123	MAIN

Step	Action
6.	<p>The Find an Existing Value page displays with a table of available RFQ results.</p> <p>Click the vendor link.</p> <p><u>STAPLES01-001</u></p>

ORACLE
Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update Vendor Responses

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window ? Help Personalize Page http

Maintain Responses

Business Unit: MJUD RFQ ID: SUPP-001

*Vendor ID: 0000000009 Vendor Name: STAPLES OFFICE SUPPLIES

Vendor Location: 1 RFQ Reference: Office Supplies

*Terms: NET100 Due Now Vendor Reference Quote: 0001



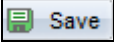
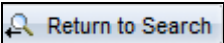
*Currency: USD Dollar *Response Date Time: 12/10/2012 2:51PM

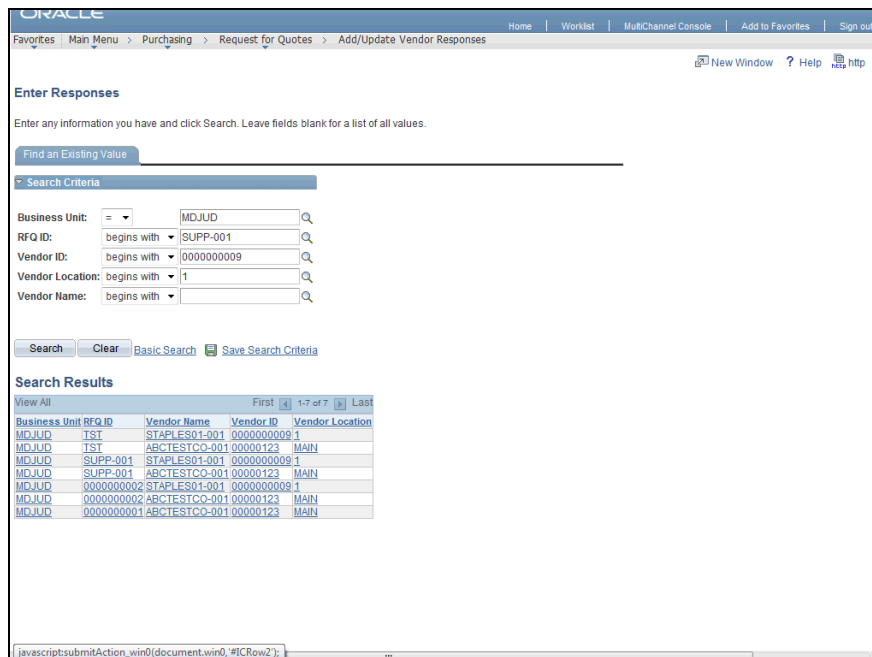
☒ Select All ☐ Clear All

Lines Personalize | Find | View All | First 1 of 1

Vendor Responded	Item ID	Description	Minimum Quantity	Quantity	*UOM	Price	Req Price	Req Currency	Due Date	Lead Time
<input type="checkbox"/>	DC-1	Stamps, Rubber	10.0000	10.0000	EA	72.00000			12/28/2012	30

Document Status Exchange Rate Response Header Details Response Comments... Send Email

Step	Action
7.	The Maintain Responses page displays. Use this page to enter vendor quotes and response information for the selected vendor.
8.	Click the Vendor Responded option. 
9.	Enter the desired information into the Quantity field.
10.	Enter the desired information into the Price field.
11.	Click the Due Date Calendar button. This is the date the vendor promises to be able to deliver the goods. Select the Due Date . 
12.	Click the Save button. 
13.	Click the Return to Search button. 



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update Vendor Responses

New Window ? Help http

Enter Responses

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit: = MDJUD

RFQ ID: begins with SUPP-001

Vendor ID: begins with 0000000009

Vendor Location: begins with 1

Vendor Name: begins with

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-7 of 7 Last

Business Unit	RFQ ID	Vendor Name	Vendor ID	Vendor Location
MDJUD	TST	STAPLES01-001	0000000009	1
MDJUD	TST	ARCTESTCO-001	00000123	MAIN
MDJUD	SUPP-001	STAPLES01-001	0000000009	1
MDJUD	SUPP-001	ARCTESTCO-001	00000123	MAIN
MDJUD	0000000002	STAPLES01-001	0000000009	1
MDJUD	0000000002	ARCTESTCO-001	00000123	MAIN
MDJUD	0000000001	ARCTESTCO-001	00000123	MAIN

[javascript:submitAction_win0(document.win0,'#fRow2');]

Step	Action
14.	The Enter Responses - Find an Existing Value page displays again with the results from the search you performed earlier.

ORACLE

Home | Worklet | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update Vendor Responses

New Window ? Help http

Enter Responses

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit: = MDJUD

RFQ ID: begins with SUPP-001

Vendor ID: begins with 0000000009

Vendor Location: begins with 1

Vendor Name: begins with

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-7 of 7 Last

Business Unit	RFQ ID	Vendor Name	Vendor ID	Vendor Location
MDJUD	TST	STAPLES01-001	0000000009	1
MDJUD	TST	ABCTESTCO-001	00000123	MAIN
MDJUD	SUPP-001	STAPLES01-001	0000000009	1
MDJUD	SUPP-001	ABCTESTCO-001	00000123	MAIN
MDJUD	0000000002	STAPLES01-001	0000000009	1
MDJUD	0000000002	ABCTESTCO-001	00000123	MAIN
MDJUD	0000000001	ABCTESTCO-001	00000123	MAIN

javascript:submitAction_win0(document.win0,'#CRow2');

Step	Action
15.	<p>To enter responses for other vendors for the RFQ, click the vendor link in the search results grid</p> <p>NOTE: if needed, enter search criteria to find the appropriate vendors.</p> <p>ABCTESTCO-001</p>

ORACLE
Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update Vendor Responses

New Window ? Help Personalize Page ntu http

Maintain Responses

Business Unit: MDJUD RFQ ID: SUPP-001
 *Vendor ID: 00000123 Vendor Name: ABC TEST COMPANY
 Vendor Location: MAIN RFQ Reference: Office Supplies
 *Terms: NET00 Due Now Vendor Reference Quote:
 *Currency: USD Dollar *Response Date Time: 12/10/2012 3:41PM

☒ Select All ☐ Clear All

Lines Personalize | Find | View All | First | Last | 1 of 1

Line Info	More Details	Item ID	Description	Minimum Quantity	Quantity	*UOM	Price	Req Price	Req Currency	Due Date	Lead Time
Vendor Responded		DC-1	Stamps, Rubber	10.0000	10.0000	EA	70.00000			12/26/2012	14

Document Status Exchange Rate Response Header Details Response Comments Send Email

Save Return to Search Previous in List Next in List Notify Refresh

Step	Action
16.	<p>The Maintain Responses page displays with the selected vendor in the Vendor Name field.</p> <p>NOTE: The Vendor Reference Quote field does not have a value this time.</p>

ORACLE
Favorites | Main Menu > Purchasing > Request for Quotes > Add/Update Vendor Responses

New Window ? Help Personalize Page ntu http

Maintain Responses

Business Unit: MDJUD RFQ ID: SUPP-001
 *Vendor ID: 00000123 Vendor Name: ABC TEST COMPANY
 Vendor Location: MAIN RFQ Reference: Office Supplies
 *Terms: NET00 Due Now Vendor Reference Quote:
 *Currency: USD Dollar *Response Date Time: 12/10/2012 3:41PM



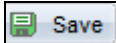
☒ Select All ☐ Clear All

Lines Personalize | Find | View All | First | Last | 1 of 1

Line Info	More Details	Item ID	Description	Minimum Quantity	Quantity	*UOM	Price	Req Price	Req Currency	Due Date	Lead Time
Vendor Responded		DC-1	Stamps, Rubber	10.0000	10.0000	EA	70.00000			12/26/2012	14

Document Status Exchange Rate Response Header Details Response Comments Send Email

Save Return to Search Previous in List Next in List Notify Refresh

Step	Action
17.	Enter the desired information into the Vendor Reference Quote field.
18.	Click the Vendor Responded option. 
19.	Enter the desired information into the Minimum Quantity field.
20.	Enter the desired information into the Price field.
21.	Click the Due Date Calendar button. This is the date the vendor promises to deliver the goods. Select the Due Date . 
22.	Enter the desired information into the Lead Time field.
23.	Click the Save button. 
24.	You have successfully completed the <i>Entering RFQ Responses</i> topic. You have learned to: - Enter RFQ responses received from the vendors - Review quotes from the vendors of the Vendor Quote Group End of Procedure.

1.5 Analyzing and Awarding Quotes

After entering RFQ Responses, you can review and analyze the responses from your supplier group. Analyzing the responses assists in making a fair decision in whom to issue an award.

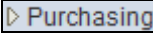


Price is an important component in a decision about which vendor will be given the award but price is not the only determining factor. Other factors also go into the final decision. It is also a possible outcome that no award will be given. Generating an RFQ does not require the Judiciary to actually make an award.

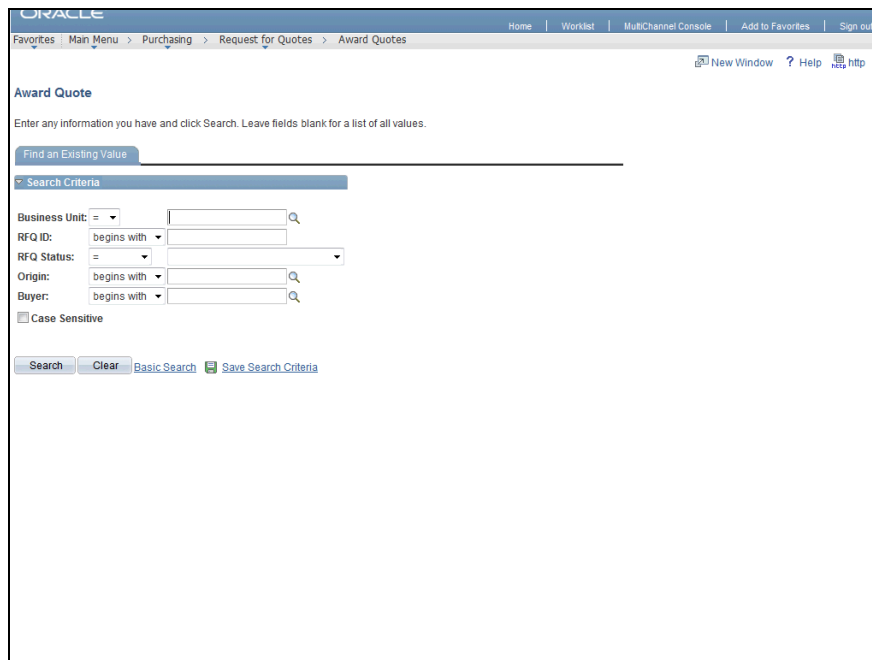
After completing this topic, you will be able to:


- Analyze the vendor responses
- Make a decision and offer an award to the chosen vendor

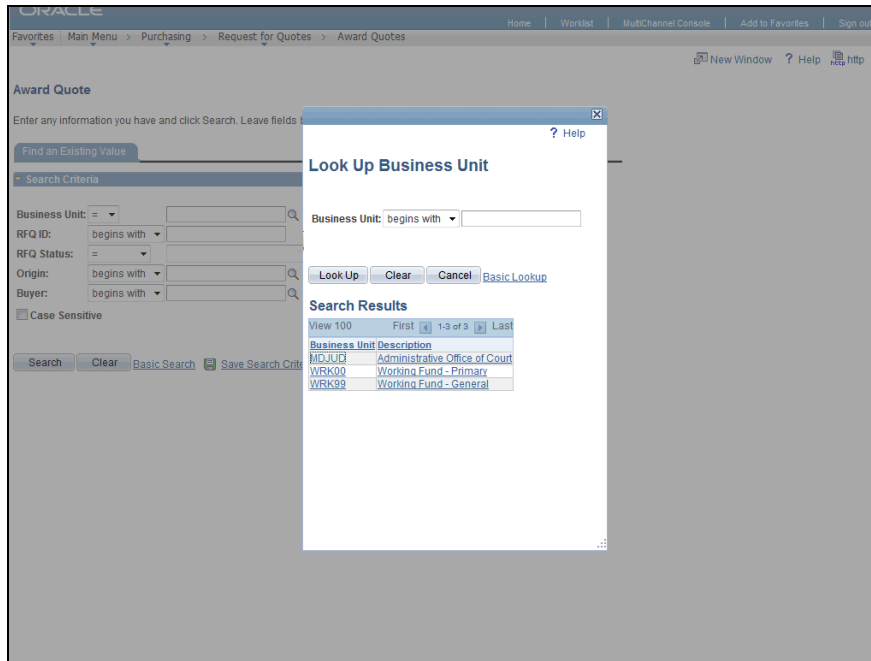
Procedure

In this topic, you will analyze the responses and issue an award.

Step	Action
1.	Begin by navigating to the Award Quote page. Click the Purchasing link. 
2.	Click the Request for Quotes link. 
3.	Click the Award Quotes link. 



Step	Action
4.	The Find an Existing Value page for Award Quote displays. Use this page to perform a general search by business unit to find an RFQ.
5.	Click the Look up Business Unit (Alt+5) button. 



Step	Action
6.	<p>The Look Up Business Unit page displays.</p> <p>Use this page to select the Business Unit.</p> <p>Click the MDJUD link.</p> <p>MDJUD</p>
7.	<p>Click the Search button.</p> <p>Search</p>



ORACLE
Favorites | Main Menu > Purchasing > Request for Quotes > Award Quotes
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Award Quote
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit: = MDJUD
RFQ ID: begins with
RFQ Status: =
Origin: begins with
Buyer: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-4 of 4 Last

Business Unit	RFQ ID	RFQ Status	Origin	Buyer
MDJUD	TST	Approved	ONL	(blank)
MDJUD	SUPP-001	Approved	ONL	(blank)
MDJUD	0000000002	Approved	ONL	APPEIFER
MDJUD	0000000001	Approved	ONL	APPEIFER

javascript:submitAction_win0(document.win0,'#fCRwd1');

Step	Action
8.	<p>The Find an Existing Value page displays with a table of available RFQ results.</p> <p>Click the vendor link.</p> <p><u>SUPP-001</u></p>

ORACLE
Favorites | Main Menu > Purchasing > Request for Quotes > Award Quotes
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Analyze Quote Create PO/Contract

Business Unit: MDJUD RFQ ID: SUPP-001 Office Supplies Currency Code: USD

Award List of Items to Vendor:

Line	Item ID	Description	UOM	Quantity	Price	Due Date	Lead Time	Pay Terms	Freight Terms
1	DC-1	Stamps, Rubber	EA	10.0000	75.00000	USD		NET00	DES

List of Vendors who Responded

Vendor ID	Location	Vendor Name	Qty Award	UOM	Price	Currency	Quantity	Due Date	Lead Time	Terms	Freight Terms
0000000009	1	STAPLES01		EA	72.00000	USD	10.0000	12/28/2012	30	NET00	DES

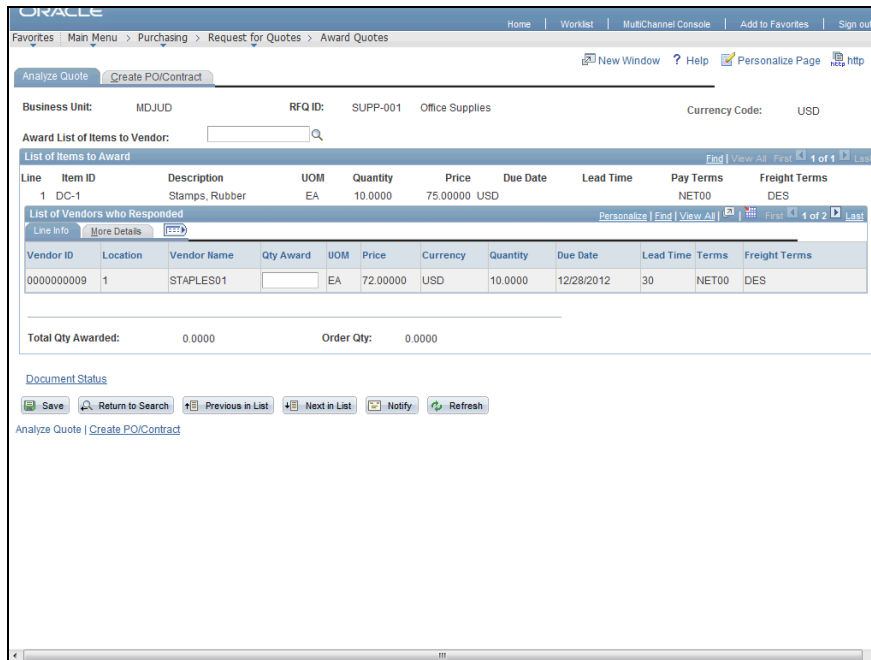
Total Qty Awarded: 0.0000 Order Qty: 0.0000

Document Status

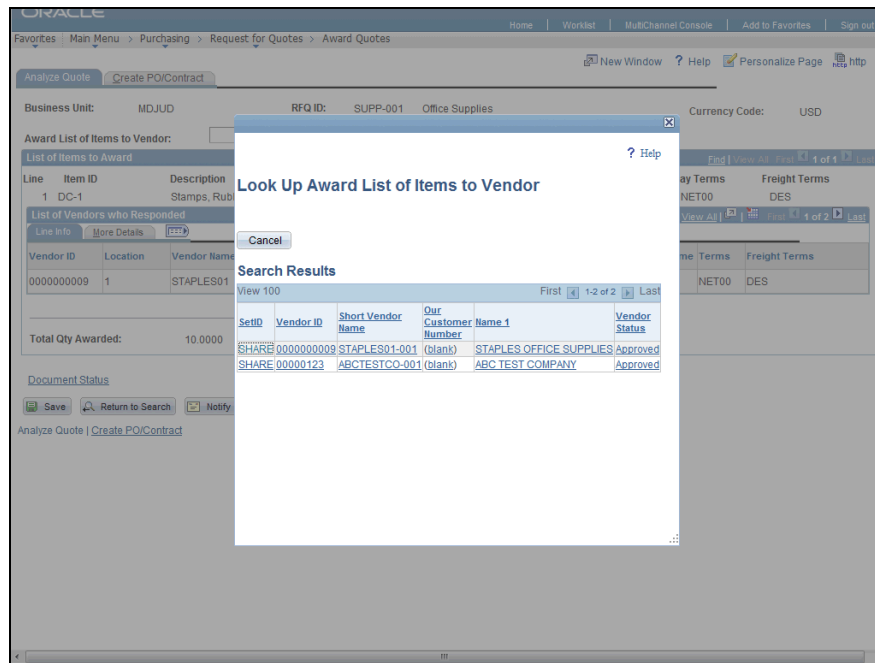
Save Return to Search Previous in List Next in List Notify Refresh

Analyze Quote | Create PO/Contract

Step	Action
9.	<p>The Analyze Quote page displays.</p> <p>Use this page to review the information from the vendor's response <i>and</i> to document notes or comments.</p>



Step	Action
10.	<p>Click the Look up Award List of Items to Vendor button.</p> 



Step	Action
11.	<p>The Look Up Award List of Items to Vendor page displays.</p> <p>Click the vendor link.</p> <p>.</p> <p><u>STAPLES01-001</u></p>
12.	<p>Enter the desired information into the Qty Award field. For this example, enter "10".</p>
13.	<p>Click the More Details tab.</p> <p><u>More Details</u></p>
14.	<p>Click in the Comment field to enter comments. For this example, enter "Congratulations!" in the Comment field.</p>
15.	<p>Click the Save button.</p> <p>NOTE: Next step(s) in procurement (not addressed in this topic) is 'Create PO/Contract', depending if a blanket contract is created or if a PO is needed.</p> <p><u>Save</u></p>
16.	<p>You have successfully completed the <i>Analyzing and Awarding Quotes</i> topic.</p> <p>You have learned to:</p> <ul style="list-style-type: none"> - Analyze the vendor responses - Make a decision and offer an award to the chosen vendor <p>End of Procedure.</p>

Lesson 2: Inquiring on RFQ Information

Lesson Overview

This lesson covers the methods that are available in GEARS to review RFQ information.

Lesson Objectives

After completing this lesson, you will be able to:

- Review vendor responses using online inquiry pages

2.1 Reviewing Vendor Responses





Prior to the Judiciary making a decision on which vendor to award with a contract, a review of the vendor's response is necessary.

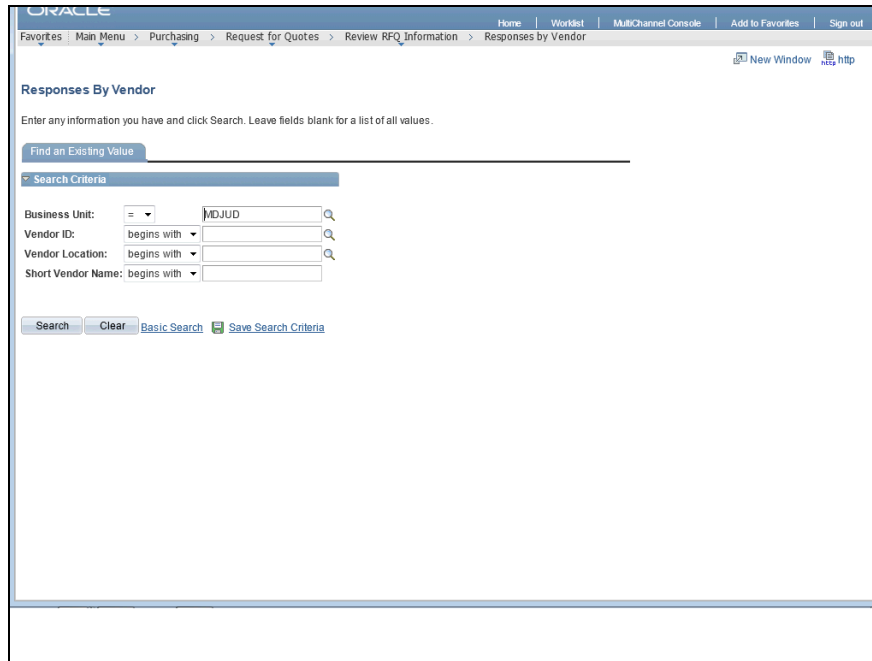
After completing this topic, you will be able to:

- Search for a vendor
- Review vendor's responses

Procedure

In this topic, you will learn how to search for a vendor and review the vendor response information after vendors have responded to a solicitation.

Step	Action
1.	Begin by navigating to the Response by Vendor page. Click the Purchasing link. 
2.	Click the Request for Quotes link. 
3.	Click the Review RFQ Information link. 
4.	Click the Responses by Vendor link. 



ORACLE

Home | Worklist | Multichannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Request for Quotes > Review RFQ Information > Responses by Vendor

New Window http

Responses By Vendor

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

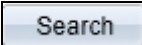


Business Unit:

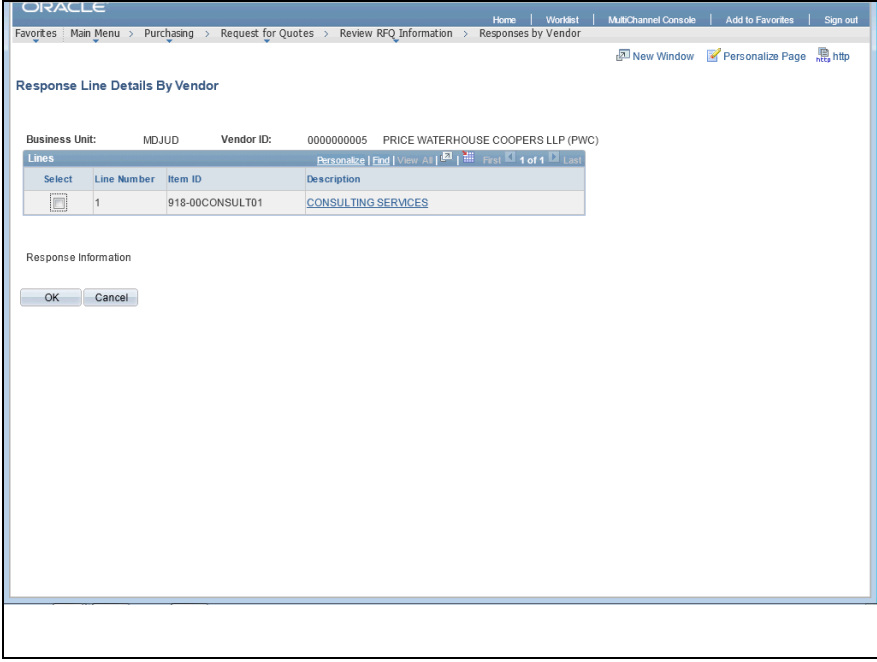
Vendor ID:

Vendor Location:

Short Vendor Name:

Search Clear Basic Search Save Search Criteria

Step	Action
5.	The Find an Existing Value page displays. Use this page to search for vendors who have responses to an RFQ.
6.	Enter the desired information in the Vendor ID field or click the Search button. 
7.	The search results displays. For this example, click the 0000000005 link. 
8.	The Responses by Vendor page displays. Use this page to review vendor response information and navigate to the specific information about the vendor response you desire to view.
9.	Click the Details link. 



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Request for Quotes > Review RFQ Information > Responses by Vendor

New Window | Personalize Page | http

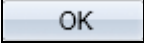
Response Line Details By Vendor

Business Unit: MDJUD Vendor ID: 0000000005 PRICE WATERHOUSE COOPERS LLP (PWC)

Select	Line Number	Item ID	Description
	1	918-00CONSULT01	CONSULTING SERVICES

Response Information

OK Cancel

Step	Action
10.	<p>The Response Line Details By Vendor page displays. Review the information. After you are done viewing, click the OK button.</p> 
11.	<p>You have successfully completed the <i>Reviewing Vendor Responses</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> - Search for a vendor - Review vendor responses <p>End of Procedure.</p>

Course Summary



Congratulations!

You have successfully completed the *PO250 Managing Request for Quotes (RFQs)* course. In this course, you have learned how to:

- Enter and update vendor Requests for Quotes to support vendor solicitation
- Use online inquiry pages to review vendor responses

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at <http://courtnet/gears/index.html> (<http://courtnet/gears/index.html>).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at gearstraining@mdcourts.gov (<mailto:gearstraining@mdcourts.gov>).